

## Yorkshire Funders

### Helping Funders to Measure What Matters – Taking The Next Steps on Your Impact Journey

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Session delivered by:

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### Session overview

Considering the findings of PBE's ['Helping Funders to Measure What Matters'](#) report to help bring clarity as to what you should measure and how. See where you currently are, what your next steps could look like and how taking a wellbeing lens can provide valuable structure to help you.

### Session Summary

PBE specialises in quantitative element of evaluation – putting a £ and p on impact. But that's only a part of how to understand impact. A quantitative approach isn't always right or useful – you need to give it some thought.

All funders sit somewhere on a spectrum – from light touch through to being very measurement focused. There are trade offs along this spectrum in terms of resource and evidence. There is no right or wrong place on this spectrum – it is a choice for each funder based on philosophy and size of grants. But it's important to align your expectations with what you are asking for from your grantees.

Spirit of 2012 used a qualitative approach as well by collating different case study examples. There is really good guidance on how to do this (see resources).

Small grants supporting small charities is a challenging area but there are some options that can help. PBE is currently running a trial with a funder specialising in supporting small charities. They have helped them to come up with a single measurement tool – a survey that will capture all the data needed to do an economic evaluation, stored in a central place for ease and GDPR reasons. The aim is to get data from a group of recipients where it has typically been hard to get this information. There are options even for small charities and at small grant levels. This would tend to be as an option rather than a compulsion.

For funders working in the area of systems change/policy influence, quantitative measurement will not really work, as impact analysis is more nuanced.

Q: Are there any shortcuts to help go towards the right hand side of the scale with the minimum effort?

A: Using wellbeing outcomes is a useful solution – see slide of four questions. These were used by Spirit of 2012 as a way to measure wellbeing and have also been adopted by The Treasury to measure policy impact.

Q: How do you use those questions if you aren't directly supporting individuals? We tend to support organisations who themselves support individuals.

A: You would be asking your grantees to capture this information from the organisation you are funding. They would typically have multiple touchpoints with those individuals.

An example is Empowher, supported by Spirit of 2012. They were asked to gather wellbeing data from the young people they were working with. Empowher were able to share this data back based on subsets of groups they were supporting. E.g. Young people with disabilities were scoring lower than those without for life satisfaction question. This prompted a conversation with Empowher at annual review, to consider whether something could be done to improve reach – e.g. accessibility of delivery. They put a pause on delivery supported by Spirit of 2012 and made changes including adding collaborations with organisations working with people with disabilities – the later waves did a much better job of reaching those people (who probably need the help most).

This could also be replicated by capturing different data to pull out disadvantage – e.g. teenage girls v boys. Spirit of 2012 were also very open that this may not improve wellbeing and this would not impact funding – this gave Empowher the opportunity to explore this approach without worrying. The programme lasted 4 months and the after data showed a 1.0 step up on the 0-10 scale at the end of the programme.

But would this have happened anyway? Spirit of 2012 commissioned support from PBE to look at the data on an individual-by-individual basis (anonymised) to look at comparison of outcomes to the control group. Because these measures have been widely used, we can find a similar group of people from a longitudinal survey who started off with similar base levels and compare them to the Spirit of 2012 group. This proved the value of the programme as the control group showed a drop in wellbeing. We could then start to translate the improvement into an economic value using a treasury- endorsed approach – in this case, £5 of wellbeing benefits for every £1 spent.

In turn, this can also be used by the funder as evidence to go out and fundraise further or to tell their story more powerfully.

Q: How do you go about doing a matched comparison group? Who do you go to, how much does it cost?

A: Spirit of 2012 had PBE support – it is artificially constructed – there is a really strong publicly available evidence base to go on. Most funders don't have the analytical expertise required in house. As a very rough ballpark, cost would be in the territory of £20k. Particularly worthwhile if you are looking to influence policy or attract more funding.

Q: Linking back to baseline data, is there not any publicly available data looking at general public's wellbeing that could be used as a proxy?

A: At the start of Spirit, we were looking at national average rather than using PBE help– this can also be by area. ONS data on average wellbeing is published regularly. The challenge is that most charities are focused on a particular group which is not the national average. Also, at a national level, things don't change to shift dramatically, this can be very different on an individual level.

There's also a difference on when you want to use it as a tool to reflect and when you want to use it for any contribution or moving towards proof. It can still be really powerful so long as you aren't over- interpreting. In the report, there's an appendix that covers when you might collect baseline data etc.

Q: Which systems and/or online tools would you suggest we could recommend to small charities?

A: The starting point is to ask what you want to achieve from it. There are none of the ready-made online systems that I would wholeheartedly recommend but there are some tools (e.g. measureup) that does a good job. Tools that help people think about theory of change/theory of change workshops are also a good place to start. The key advice for theory of change work is to start at the end – see Nesta guide in the resources. You can definitely get a lot of value from doing it yourself.

Q: Has anyone found negative responses on surveys? Is there not bias – nobody is going to say anything negative?

A: On one level, there's a universal problem around this with bias as to who responds to surveys. There are things you do to minimise this issue – how you present the survey, what questions you ask (don't ask leading questions), when in a survey you ask those questions (guidance is to do after basic demographics). It's also worth looking at completion rates – completion rates around 60% are a realistic target to minimise bias.

What is the time lag on the ONS data?

It is updated annually in May

## Useful Resources

Case study synthesis work (qualitative approach): [87-Creative-pathways-to-wellbeing-a-synthesis-of-project-case-studies-2024.pdf](#)

So that doc above is us using the case study synthesis on a specific project, but also useful to have a clear summary of methodology: [» Case study synthesis: Centre guide](#)

Here's the report we published with Spirit on this area of work:

<https://pbe.co.uk/publications/helping-funders-to-measure-what-matters/>

This is a really good practical guide to developing a theory of change that I would recommend:

[https://media.nesta.org.uk/documents/theory\\_of\\_change\\_guidance\\_for\\_applicants\\_.pdf](https://media.nesta.org.uk/documents/theory_of_change_guidance_for_applicants_.pdf)

<https://pbe.co.uk/insights/showing-the-economic-value-of-being-small/>

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